ONE SPOT Demo to Assist
<u>NEW</u> Taxpayers with Filing Non-State Administered (NSA) Taxes in My Alabama Taxes (MAT)

1. Add Banking Information

2. Setup Local Tax Account Access

3. Enter Data on Local Tax Return Table

During the demo, click the buttons or links on the page, do not scroll through the document.

NEXT

NSA Instructions for MAT Demo

Demonstration steps for taxpayer that has <u>never</u> filed a Local Tax return in MAT:

- Set up banking information. Although recommended as the first step, it is not required. Banking set up may be processed on the payment screen of the Local Tax return and saved as the default payment channel, if chosen.
- Set up Local Tax account access.
    - Select Local Tax.
    - Set the type of access to "File & Pay".
- File Local Tax Return
    - Select the correct filing period.
    - Select "Click here to edit ONE SPOT return table" to add a locality and enter gross amount of sales for the filing period; this link must be clicked even if gross sales are **zero**. Localities may be added or deleted from the table for a subsequent filing.
    - Add Locality. Start typing locality's name in the first empty "Locality Name" white field to obtain a condensed list. NOTE: There will always be an empty column in the return table for use in adding new localities to the return.
    - Enter all remaining required information.
    - Select "One-Time Filing" checkbox ONLY if taxpayer does not need to retain information for subsequent filings.
- Discount, Late Fees, and Interest calculations can be viewed in the "Overview" tab. If changes are required, the taxpayer must return to the "Enter Data" tab (previous screen) and select "Click here to edit ONE SPOT return table".
- The taxpayer must confirm the payment information on the Payment screen and select "**Submit**" for return/payment to be processed. The "Submit" button is not available in the demo.

NOTES:
- Demo is not date based. Calculations are made for discount but not P&I.
- Banking set up information shown in Demo does not carryforward to return/payment Demo.

<div align="center">

Click here to start Demo

</div>

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☰ **MAT**　**DEMO SESSION**　　　　　　⚙ Settings　🔒 Log Off

🏠 My Alabama Taxes

Recommended to setup banking information first.　Click ↖

👤 **Logon**

> John Smith
john.smith@abcbakery.com
+1 (334) 555-5555
Last logged on 20-Aug-2018

Balance: $0.00

🚩 **Alerts**

ⓘ There is 1 unread message

📋 **I Want To**

Manage payments and returns

Obtain a new tax account

Add access to an existing tax account

Ask a question

Accounts	Submissions	Correspondence	Names and Addresses	Logons

📝 Accounts　　　　　　　　　　　　　　　　　　　　**View Accounts**

Filter

Consumers Use Tax	Monthly	CNU-R010170848	ABC BAKERY	$0.00
Local Tax	Monthly	LCL-R010170849	ABC BAKERY	$0.00

The balances shown reflect only the accounts and filing periods shown in MAT and may not reflect your overall balance with the Alabama Department of Revenue.

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My Alabama Taxes   DEMO SESSION   ⚙ Settings   🔒 Log Off

🏠 My Alabama Taxes › Settings

Profile Access Payment Channels Activity

👤 Logon   [Edit]   🚩 Alerts   📋 I Want To

> John Smith   ✔ There are no alerts   ⚙ Change password
  john.smith@abcbakery.com
  +1 (334) 555-5555   🔒 Secondary logons

  Access: Full Access   🔒 Additional logons

  Authentication   🔒 Third party access
  john.smith@abcbakery.com

Click   ❌ Cancel my logon

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My Alabama Taxes   **DEMO SESSION**   ⚙ Settings   🔒 Log Off

🏠 My Alabama Taxes › Settings

Profile	Access	Payment Channels	Activity

🏛 Payment Channels

Filter

ABC BAKERY - **-*5555**

➕ Setup new payment channel   ⬅ Click

No default payment channel	Consumers Use Tax	CNU-R010170848
	Local Tax	LCL-R010170849

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My Alabama Taxes   **DEMO SESSION**   ⚙ Settings   🔒 Log Off

🏠 My Alabama Taxes › Settings › Add Payment Channel

🏢 Limited Liability Company

> ABC BAKERY
  -*5555

🏛 Payment Channel

This payment channel will be available for you to use for all of this customer's accounts.

Type

| Direct Debit | ▼ |

🏛 Bank Account

Bank Account Type

| Required | ▼ |

Required

Routing Number

| Required |

Account Number

| Required |

Confirm Account Number

| Required |

Use default name

| No | **Yes** |

Name

| |

Complete information and Click "Save".

Save   Cancel

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My Alabama Taxes   ⚙ Settings   🔒 Log Off

🏠 My Alabama Taxes ❯ Settings ❯ JPMORGAN CHASE - *5555 **(TEST SITE)**

🏛 Payment Channel   [name]   ☑ Accounts Using This Payment Channel

JPMORGAN CHASE - *5555   No accounts are using this payment channel

For: ABC BAKERY

Direct Debit

   JPMORGAN CHASE

   Checking

   021000021

   ****5555

Remove this payment channel

Click "Settings" to get back to
the list of accounts to attach to
this saved banking information.

Either tax account type may be selected first; however, this example is for Local Tax.

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My Alabama Taxes   **DEMO SESSION**   ⚙ Settings   🔒 Log Off

🏠 My Alabama Taxes › Settings › Select Payment Channel

✎ Account

ABC BAKERY
-*5555

› Local Tax
LCL-R010170849

🏛 Default Payment Channel

Current Default	
No current default	

ABC BAKERY - **-***5555	
JPMORGAN CHASE - *5555	Set as default
⊕ Setup new payment channel	

← Click

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My Alabama Taxes   **DEMO SESSION**   ⚙ Settings   🔒 Log Off

🏠 My Alabama Taxes   ❯   Settings   ❯   Select Payment Channel

✏ Account   🏛 Default Payment Channel

ABC BAKERY | **Current Default** | |
-*5555

❯ Local Tax   No current default
LCL-R010170849

| **ABC BAKERY** - **-***5555 | |

JPMORGAN CHASE - *5555   Set as default

Are you sure you want to set this payment channel as the account's default?

Click ➡   Yes   No

An official website of the United States government. Here's how you know ⌄

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My Alabama Taxes   DEMO SESSION   ⚙ Settings   🔒 Log Off

🏠 My Alabama Taxes ❯ Settings ❯ Select Payment Channel

Click on this "Settings" link to get to the other tax types to set their default payment channel.

📝 Account

ABC BAKERY
-*5555

❯ Local Tax
LCL-R010170849

🏛 Default Payment Channel

Current Default	
JPMORGAN CHASE - *5555	Clear default

ABC BAKERY - **-***5555	
JPMORGAN CHASE - *5555	**Current default**
⊕ Setup new payment channel	

The saved payment channel now shows as the current default for the "Local Tax" account.

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My Alabama Taxes   DEMO SESSION   ⚙ Settings   🔒 Log Off

🏠 My Alabama Taxes ❯ Settings ❯ Select Payment Channel

📝 Account

ABC BAKERY
-*5555

❯ Local Tax
LCL-R010170849

🏛 Default Payment Channel

Current Default	
JPMORGAN CHASE - *5555	Clear default

ABC BAKERY - **-***5555	
JPMORGAN CHASE - *5555	**Current default**
➕ Setup new payment channel	

When done setting the default banking on all accounts, click the My Alabama Taxes link to go to the Home screen.

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☰ **MAT** **DEMO SESSION**   ⚙ Settings   🔒 Log Off

🏠 My Alabama Taxes

👤 Logon
> John Smith
john.smith@abcbakery.com
+1 (334) 555-5555
Last logged on 20-Aug-2018

Balance: $0.00

🚩 Alerts
ℹ There is 1 unread message

Taxpayers do NOT "Add access" to their NSA account number, they file their NSA through the State assigned Local Tax account.

📋 I Want To
Manage payments and returns

Obtain a new tax account

Add access to an existing tax account

Ask a question

| Accounts | Submissions | Correspondence | Names and Addresses | Logons |

Accounts   **View Accounts**

Filter

| Consumers Use Tax | Monthly | CNU-R010170848 | ABC BAKERY | $0.00 |
| Local Tax ⬅ Click | Monthly | LCL-R010170849 | ABC BAKERY | $0.00 |

The balances shown reflect only the accounts and filing periods shown in MAT and may not reflect your overall balance with the Alabama Department of Revenue.

First time users must set the account access for each of their accounts by clicking the account type link.

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☰ **My Alabama Taxes**   **DEMO SESSION**   ⚙ Settings   🔒 Log Off

🏠 My Alabama Taxes › Confirm Access

📝 Account

ABC BAKERY
-*5555

› Local Tax
LCL-R010170849

⚙ Account Settings

It appears this is the first time you have accessed your Local Tax account. Please review the default settings below and make any necessary changes. Once you are happy with the settings, click Save and we will direct you to your account.

Type of Access

| Required ▼ |

Required

⬅ Click

Save   Cancel

The first time an account is accessed in MAT,
the user must set their access type.

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☰ **My Alabama Taxes**   DEMO SESSION   ⚙ Settings   🔒 Log Off

🏠 My Alabama Taxes › Confirm Access

📝 Account

ABC BAKERY
-*5555

› Local Tax
    LCL-R010170849

⚙ Account Settings

It appears this is the first time you have accessed your Local Tax account. Please review the default settings below and make any necessary changes. Once you are happy with the settings, click Save and we will direct you to your account.

Type of Access

Required ▼
Required
File
File & Pay
Pay
View

Required

Select ↖

Save   Cancel

If the Local Tax account access is set to anything other than "File & Pay," the user will NOT be able to file a return with an NSA locality.

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≡ **My Alabama Taxes**   DEMO SESSION   ⚙ Settings   🔒 Log Off

🏠 My Alabama Taxes ＞ Confirm Access

📝 **Account**   ⚙ **Account Settings**

ABC BAKERY   It appears this is the first time you have accessed your Local Tax account. Please review the default
-*5555   settings below and make any necessary changes. Once you are happy with the settings, click Save and
                          we will direct you to your account.
＞ Local Tax
LCL-R010170849   **Type of Access**

                          | File & Pay   ▼ |

                                              Click ➡ [Save] [Cancel]

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DEPARTMENT OF REVENUE HOME   **HELP**   **CONTACT US**

≡ **My Alabama Taxes**   **DEMO SESSION**   ⚙ Settings   🔒 Log Off

🏠 My Alabama Taxes › Confirm Access › Local Tax

📝 **Account**   🚩 **Account Alerts**   📋 **I Want To**   More...

ABC BAKERY   ⚠ File return for 31-Jul-2018   Manage payments and returns
-*5555
                                 ⚠ File return for 30-Jun-20☐   Make a billing payment
› Local Tax
  LCL-R010170849   ⚠ File return for 31-May-2018   Ask a question
  Balance: $0.00

Periods   **Submissions**   **Correspondence**   **Names and Addresses**   **Logons**

📅 **Periods**   **View Periods**

31-Jul-2018	$0.00	Outstanding	📄 File Return
30-Jun-2018	$0.00	Delinquent	📄 File Return
31-May-2018	$0.00	Delinquent	📄 File Return

Click

To click directly to the return to be filed.*

The balances shown reflect only the accounts and filing periods shown in MAT and may not reflect your overall balance with the Alabama Department of Revenue.

*The two "File Return" links may not be available if the Local Tax account is not coded as "required" by the State for local state-administration purposes. If unavailable, click the Period or "Manage payments and returns" links to get to the return.

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☰ **My Alabama Taxes**   DEMO SESSION   ⚙ Settings   🔒 Log Off

🏠 My Alabama Taxes ＞ Confirm Access ＞ Local Tax

📝 **Account**

ABC BAKERY
-*5555

＞ Local Tax
LCL-R010170849

Balance: $0.00

🚩 **Account Alerts**

⚠ File return for 31-Jul-2018

⚠ File return for 30-Jun-2018

⚠ File return for 31-May-2018

📋 **I Want To**   More...

Manage payments and returns

Make a billing payment

Ask a question

Periods	Submissions	Correspondence	Names and Addresses	Logons

📅 Periods   **View Periods**

31-Jul-2018	$0.00	Outstanding	🗎 File Return
30-Jun-2018	$0.00	Delinquent	🗎 File Return
31-May-2018	$0.00	Delinquent	🗎 File Return

The balances shown reflect only the accounts and filing periods shown in MAT and may not reflect your overall balance with the Alabama Department of Revenue.

Clicking the Period link, takes you to the Period Screen where you can also reach the tax return to file.

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☰ **My Alabama Taxes**   **DEMO SESSION**   ⚙ Settings 🔒 Log Off

🏠 My Alabama Taxes ❯ Confirm Access ❯ Local Tax ❯ 31-Jul-2018

📝 Period	🚩 Period Alerts	📋 I Want To
ABC BAKERY **-***5555	⚠ File return for 31-Jul-2018 ⬅ Click ➡	File or view a return
Local Tax LCL-R010170849		Make a payment
❯ 31-Jul-2018		
Balance: $0.00		

📅 Summary	💬 Period Activity
There has been no financial activity	There has been no activity

*The link under Period Alerts may not be available if the Local Tax account is not coded as "required" by the State for local state-administration purposes.

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My Alabama Taxes   **DEMO SESSION**   ⚙ Settings   🔒 Log Off

🏠 My Alabama Taxes ＞ Manage Payments and Returns

📝 Accounts

| All ▾ |

💬 Show

| Returns ▾ |

📋 For Periods

| All ▾ |

| Not Filed ▾ |

Click

📅 Returns

| Filter |

Status	Period	For	Id	Name
File Return	31-Jul-2018	Consumers Use Tax	CNU-R010202109	ABC BAKERY
File Return	31-Jul-2018	Local Tax	LCL-R010251052	ABC BAKERY
File Return	30-Jun-2018	Consumers Use Tax	CNU-R010202109	ABC BAKERY
File Return	30-Jun-2018	Local Tax	LCL-R010251052	ABC BAKERY
File Return	31-May-2018	Consumers Use Tax	CNU-R010202109	ABC BAKERY